HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Saskatchewan

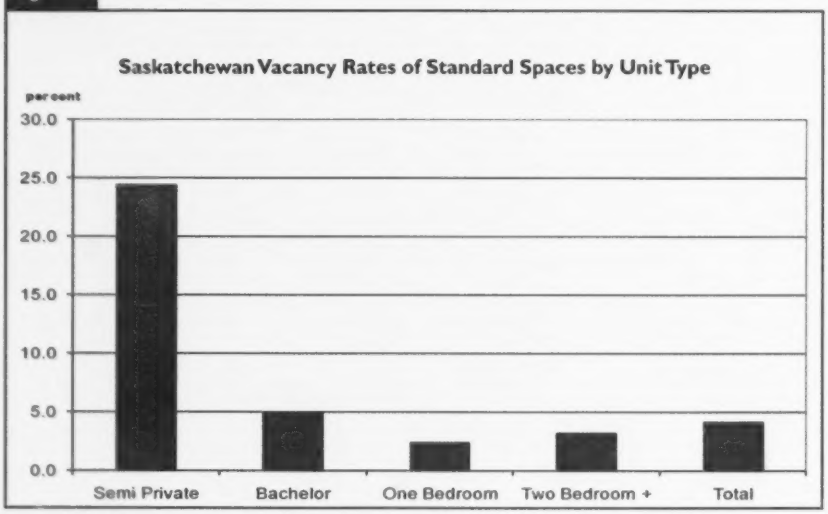
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2011

Highlights

- The overall vacancy rate for a standard unit in retirement homes across Saskatchewan was 4.1 per cent in 2011, down from 6.2 per cent in 2010.
- Regina and Saskatoon, the two largest urban centres, reported standard unit vacancy rates of 2.3 and 4.6 per cent, respectively.
- The overall average rent for a standard retirement home unit in 2011 was $2,175 in Saskatchewan, mostly unchanged from 2010, when it was $2,179.
- The 2011 survey covered a universe of 5,260 standard and non-standard spaces housing 5,488 residents.

Figure 1



Source: CMHC

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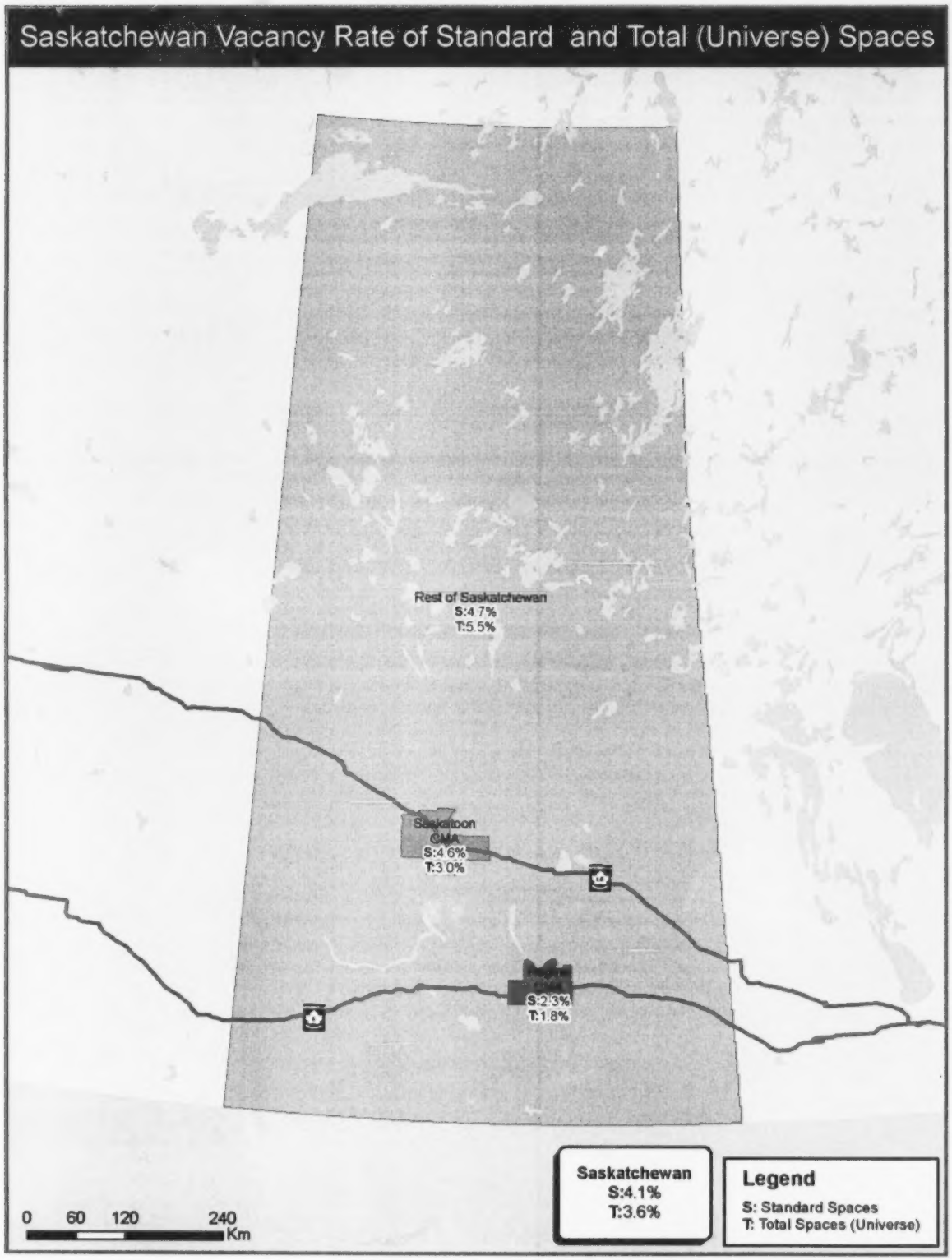

Saskatchewan Vacancy Rate of Standard and Total (Universe) Spaces
Rest of Saskatchewan
S:4.7%
T:5.5%
Saskatoon
CMA
S:4.6%
T:3.0%
S:2.3%
T:1.8%
0 60 120 240
Km
Saskatchewan
S:4.1%
T:3.6%
Legend
S: Standard Spaces
T: Total Spaces (Universe)

Vacancy Rates

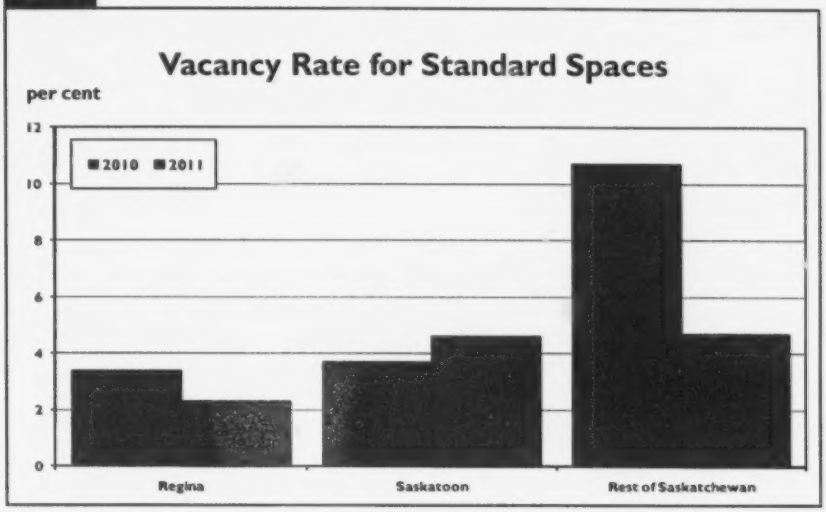
Vacancy rates edge lower for standard care units

According to Canada Mortgage and Housing Corporation's (CMHC) 2011 Seniors' Housing Survey, the average vacancy rate for standard retirement home units in Saskatchewan decreased from 6.2 per cent in 2010 to 4.1 per cent in 2011. The survey targeted private and non-profit facilities where the majority of residents are over age 65 and have access to additional services not offered in traditional rental structures such as meals, housekeeping, and laundry services.

In the Regina Census Metropolitan Area (CMA), the average vacancy rate for standard spaces was 2.3 per cent, down from 3.4 per cent in 2010. Meanwhile in Saskatoon, the average vacancy rate increased 0.9 percentage points, going from 3.7 per cent in 2010 to 4.6 per cent in 2011. The average vacancy rate for standard spaces in centres outside Saskatoon and Regina declined from 10.7 per cent in 2010 to 4.7 per cent in 2011.

Within each centre, there was significant variation in vacancy rate depending on bedroom type. In Regina, the vacancy rate was lowest at 0.9 per cent for one-bedroom units and highest at 3.6 per cent for two-bedroom and more units. Meanwhile, Saskatoon's vacancy rates ranged from a low of 1.7 per cent for two-bedroom and more units to a high of 9.1 per cent for bachelor suites. Outside the two CMAs, the highest vacancy rate was 25.6 per cent for semi-private spaces, while at 3.8 per cent, bachelor units recorded the lowest vacancy rate.

Figure 2



Source: CMHC

There was also significant variation in the vacancy rate depending on the monthly rent. For spaces renting for $1,500 or more, vacancy rates were generally lower than a year earlier. Within the subset of units renting for $1,000 to $1,499 monthly, the average vacancy rate across Saskatchewan was five per cent, up from 3.5 per cent in 2010. For units in the $1,500 to $1,999 rent range, the vacancy rate decreased 3.8 percentage points, from 6.6 per cent in 2010 to 2.8 per cent this year. Similarly, for units renting in the $2,000 to $2,499 rent range, the vacancy rate declined 3.3 percentage points from 9.5 per cent in 2010 to 6.2 per cent this year. Meanwhile, at 4.4 per cent, the average vacancy rate for units renting at the highest price range of $2,500 and more remained unchanged from the prior year.

Vacancy rates higher for heavy care units

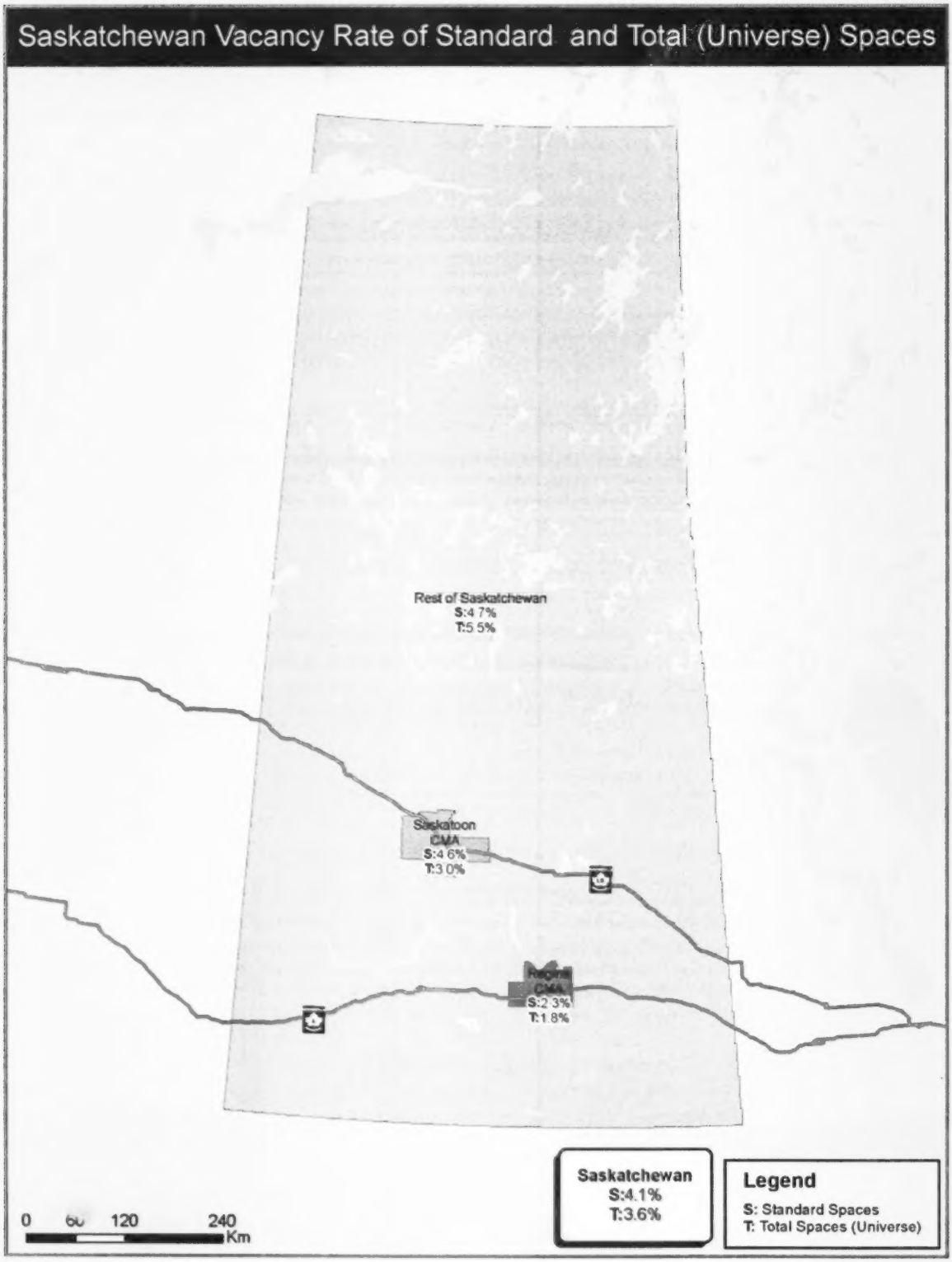
The vacancy rate for heavy care spaces in Saskatchewan increased from two per cent in 2010 to 11.4 per cent in 2011. Concurrently, the average rent declined from $2,688 in the prior year to $2,294 in 2011. The difference between a standard care unit and a heavy care unit is determined by the amount of health care provided to residents. A space where the resident receives 1.5 hours per day or more of health care is classified as a heavy care unit. Typically, the additional heath care service provided to residents of heavy care facilities significantly increases the rent over standard spaces.

Rents

Average rent for standard spaces edges lower in Saskatchewan

For standard spaces, the overall average monthly rent was $2,175 this year, down marginally from $2,179 in 2010. At $2,884 monthly, the highest average rent for standard spaces was recorded in the Regina CMA, up from $2,774 in the previous year. Meanwhile, Saskatoon's average

Saskatchewan Vacancy Rate of Standard and Total (Universe) Spaces



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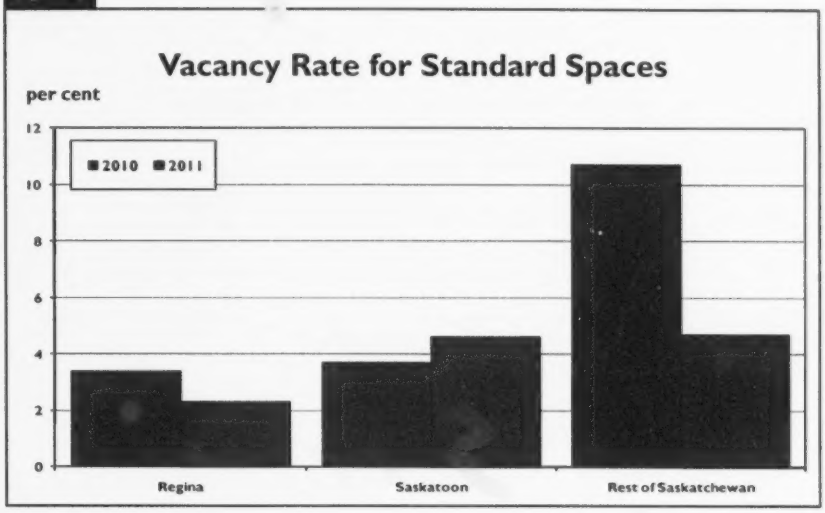

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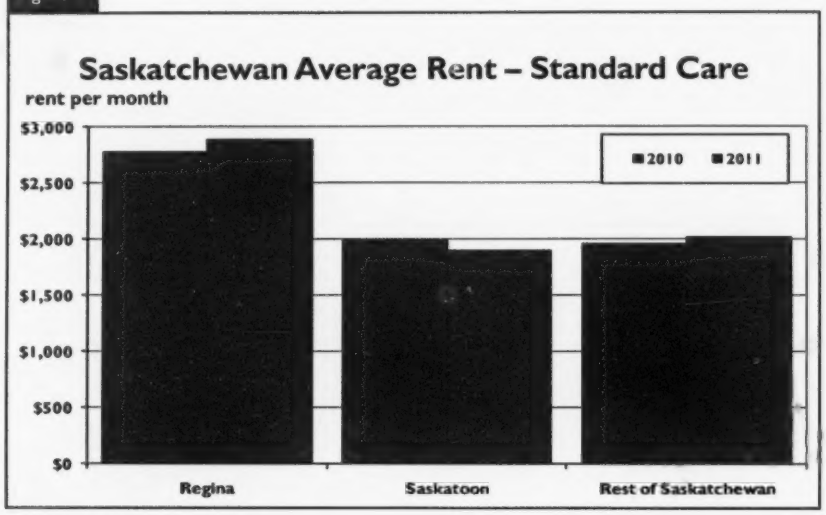


Source: CMHC

monthly rent declined by $89, from $1,988 in 2010 to $1,899 in 2011. Rather than a shift in market conditions, the reduction in Saskatoon's average rent was largely due to the composition of units, as more one-bedroom units and fewer two-bedroom and more units were surveyed this year than in 2010. In areas outside the two metropolitan areas, a $63 increase in average rents was observed, as average monthly rents rose from $1,958 in 2010 to $2,021 this year.

In Regina, average monthly rents ranged from a low of $2,741 for a bachelor suite, to a high of $3,524 for a unit with two-or-more bedrooms. Meanwhile, average rents in Saskatoon ranged from a low of $1,637 monthly for one-bedroom suites to a high of $2,254 per month for bachelor suites. In other parts of the province, the survey determined the average monthly rent varied from a low of $1,542 for semi-private suites to a high of $3,272 for two-or-more bedrooms unit types.

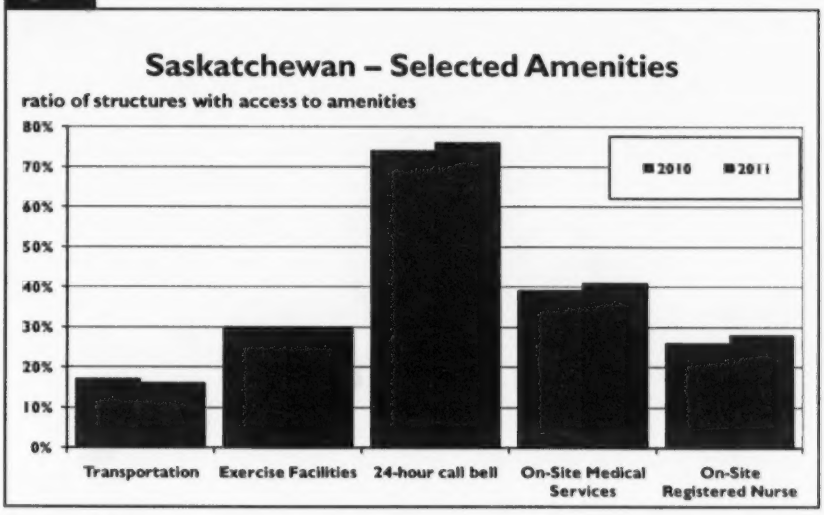
Considering all types of standard spaces across the province, a little over 57 per cent of the total survey universe had average monthly rents in excess of $2,000. Meanwhile, 36 per cent of the survey universe had average monthly rents of $2,500 or more, up from 34 per cent in 2010. In the Regina CMA, 74 per cent of all spaces had average monthly rents in excess of $2,500 while 27 per cent of surveyed spaces in Saskatoon had average monthly rents in excess of this amount.

Wide variation in services and amenities available to residents

Our survey revealed a wide variation in services available within senior's facilities across the province. On-site medical services were offered in 41 per cent of all facilities surveyed across Saskatchewan. This was higher in Regina, where 49 per cent of the facilities surveyed offer this service, while 33 per cent of the facilities surveyed in Saskatoon provided medical services on site.

Beyond medical services, residents were offered a variety of different amenities depending on the facility. The most-frequently reported amenity in Saskatchewan was 24-hour bell service, with 76 per cent of facilities across the province providing this service. Transportation services were available in 16 per cent of facilities,

Figure 4



Source: CMHC

while 30 per cent of structures provided exercise facilities. In addition, 28 per cent of all facilities surveyed offered the services of a registered nurse on-site.

Universe

Majority of Standard units are semi-private/bachelor unit

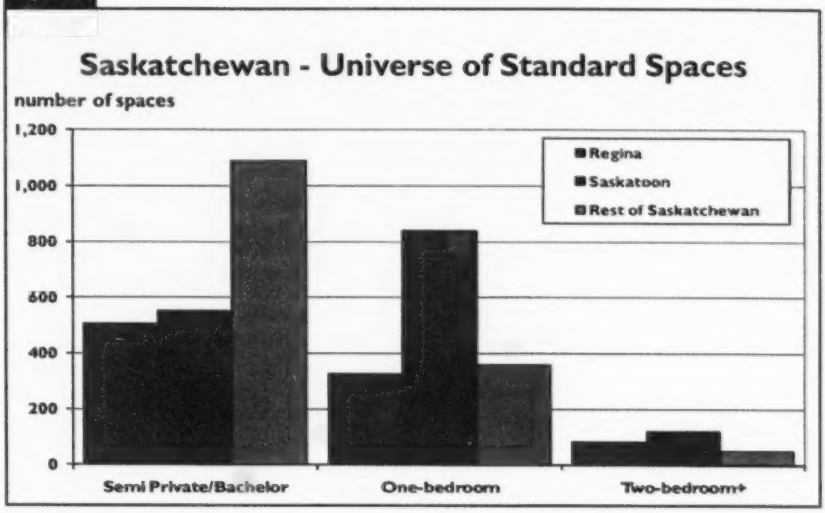
CMHC's survey found a total universe of 5,260 retirement spaces, of which 3,932 units or 75 per cent were standard spaces. This compares with a total universe of 4,685 units in the 2010 survey, of which 3,447 units were identified as standard spaces. The vast majority of retirement spaces in Saskatchewan were found in the two largest centres. The Regina CMA had 1,143 retirement spaces, of which 918 units were identified as standard spaces. Meanwhile, the Saskatoon CMA had 2,372 retirement spaces with 1,515 units identified as standard spaces. Together, both centres account for 67 per cent of this year's universe of retirement spaces and 62 per cent of all standard spaces surveyed within the province.

Among standard spaces, semi-private/bachelor units remained the most common residence type, totalling 2,149 units and representing 55 per cent of all standard units in the current survey. This proportion was down marginally from the 2010 survey when semi-private/bachelor units comprised 56 per cent of all standard units. Meanwhile, one-bedroom units accounted for a little over 39 per cent of all standard units surveyed, up from 36 per cent in the 2010 survey. Finally, two-bedroom and more units accounted for the remaining six per cent of the total universe for the current year, down from eight per cent in the 2010 survey.

There were some notable differences in the composition of spaces between the various centres in the province. At 56 per cent, one-bedroom units accounted for the bulk of all standard spaces in the Saskatoon CMA, up from 47 per cent in the 2010 survey.

In the Regina CMA, one-bedroom spaces represented 36 per cent of the standard universe, a percentage point decrease from the previous year. In the areas outside the two CMAs, semi-private/bachelor units accounted for 73 per cent of all standard spaces. Meanwhile, semi-private/bachelor units represented 55 per cent of all standard spaces in Regina and only 37 per cent in Saskatoon. The proportion of two-bedroom and more spaces was highest in the Regina CMA at nine per cent, while at eight per cent, the proportion of two-bedroom and more spaces in the Saskatoon CMA was two percentage points lower than in the 2010 survey.

Figure 5



Source: CMHC

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Regina CMA	--	--	4.8	3.0	2.2	0.9	1.1	3.6	3.4	2.3
Saskatoon CMA	**	**	5.5	9.1	2.1	1.9	1.7	1.7	3.7	4.6
Rest of Saskatchewan	19.4	25.6	12.4	3.8	6.6	5.0	2.0	6.1	10.7	4.7
Saskatchewan	**21.0**	**24.4**	**8.5**	**5.0**	**3.2**	**2.4**	**1.5**	**3.2**	**6.2**	**4.1**

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range ($)
Saskatchewan

Centre	Less than $1,000		$1,000 - $1,499		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Regina CMA	--	--	**	--	3.0	2.5	3.3	6.0	3.6	1.3	3.4	2.1
Saskatoon CMA	**	0.0	++	2.3	3.0	1.9	8.1	8.1	4.2	8.1	3.7	4.6
Rest of Saskatchewan	**	**	7.7	7.5	9.4	3.2	13.8	4.5	7.5	6.1	11.1	4.7
Saskatchewan	******	**0.5**	**3.5**	**5.0**	**6.6**	**2.8**	**9.5**	**6.2**	**4.4**	**4.4**	**6.3**	**4.0**

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces
Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2010	2011	2010	2011
Regina CMA	0.0	0.0	3,386	3,519
Saskatoon CMA	--	**	--	**
Rest of Saskatchewan	**	16.4	**	2036
Saskatchewan	**2.0**	**11.4**	**2,688**	**2,294**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2010	2011				
Regina CMA	1,143	2.9 a	1.8 a	33	1,201 a		
Saskatoon CMA	2,372	2.1 a	3.0 a	54	2,541 a		
Rest of Saskatchewan	1,745	10.0 a	5.5 a	54	1,746 a		
Saskatchewan	**5,260**	**4.6 a**	**3.6 a**	**141**	**5,488 a**	**77,000**	**7.1**

[1] Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	507	328	83	918
Saskatoon CMA	553	841	121	1,515
Rest of Saskatchewan	1,089	361	49	1,499
Saskatchewan	**2,149**	**1,530**	**253**	**3,932**

2.2 Universe by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Saskatchewan	**2,794**	**2,091**	**375**	**5,260**
Standard Spaces	2,149	1,530	253	3,932
Non-Standard Spaces	645	561	122	1,328

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2.3 Universe of Standard Spaces by Rent Range ($)
Saskatchewan

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more	Total spaces where rents are known
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	
Regina CMA	--	13.4 a	12.9 a	73.7 a	910
Saskatoon CMA	36.0 a	14.5 a	22.2 a	27.3 a	1,494
Rest of Saskatchewan	15.7 a	37.2 a	25.2 a	21.8 a	1,499
Saskatchewan	**19.8 a**	**23.0 a**	**21.2 a**	**36.0 a**	**3,903**

[1] % is based on those spaces where the rent is known.

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Saskatchewan

Centre	Meals				On-Site Medical Services	Registered Nurse onsite	24-hour call bell
	Optional	# included in rent					
		1	2	3			
Regina CMA	3.0 c	0.0 c	3.0 c	93.9 c	48.5 c	39.4 a	87.9 c
10 - 49	0.0 a	0.0 a	0.0 a	100.0 a	33.3 a	37.5 a	87.5 a
50 - 89	25.0 a	0.0 a	0.0 a	75.0 a	100.0 a	75.0 a	75.0 a
90 or more	0.0 a	0.0 a	20.0 a	80.0 a	80.0 a	20.0 a	100.0 a
Saskatoon CMA	22.2 c	9.3 c	0.0 a	68.5 c	33.3 c	27.8 c	66.7 c
10 - 49	8.6 a	0.0 a	0.0 a	91.4 a	31.4 a	34.3 a	74.3 a
50 - 89	55.6 a	22.2 a	0.0 a	22.2 a	33.3 a	11.1 a	66.7 a
90 or more	40.0 a	30.0 a	0.0 a	30.0 a	40.0 a	20.0 a	40.0 a
Rest of Saskatchewan	3.7 c	0.0 c	1.9 c	94.4 c	44.4 c	22.2 c	77.8 c
10 - 49	4.3 a	0.0 a	2.2 a	93.5 a	41.3 a	21.7 a	76.1 a
50 - 89	0.0 a	0.0 a	0.0 a	100.0 a	60.0 a	20.0 a	80.0 a
90 or more	**	**	**	**	**	**	**
Saskatchewan	**10.6 c**	**3.5 c**	**1.4 c**	**84.4 c**	**41.1 c**	**28.4 c**	**75.9 c**
10 - 49	4.8 a	0.0 a	1.0 a	94.3 a	36.2 a	29.5 a	78.1 a
50 - 89	33.3 a	11.1 a	0.0 a	55.6 a	55.6 a	27.8 a	72.2 a
90 or more	22.2 a	16.7 a	5.6 a	55.6 a	55.6 a	22.2 a	66.7 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Saskatchewan

Centre	Pharmacy	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	**0.0**	**24.2**	**3.0**	**9.1**	**9.1**	**27.3**	**30.3**
10 - 49	0.0	12.5	0.0	0.0	0.0	8.3	12.5
50 - 89	0.0	25.0	25.0	25.0	25.0	50.0	50.0
90 or more	0.0	80.0	0.0	40.0	40.0	100.0	100.0
Saskatoon CMA	**0.0**	**16.7**	**1.9**	**3.7**	**3.7**	**31.5**	**25.9**
10 - 49	0.0	11.4	0.0	0.0	0.0	11.4	14.3
50 - 89	0.0	11.1	0.0	0.0	11.1	44.4	44.4
90 or more	0.0	40.0	10.0	20.0	10.0	90.0	50.0
Rest of Saskatchewan	**0.0**	**11.1**	**0.0**	**3.7**	**1.9**	**29.6**	**24.1**
10 - 49	0.0	6.5	0.0	4.3	2.2	23.9	17.4
50 - 89	0.0	40.0	0.0	0.0	0.0	60.0	60.0
90 or more	**	**	**	**	**	**	**
Saskatchewan	**0.0**	**16.3**	**1.4**	**5.0**	**4.3**	**29.8**	**26.2**
10 - 49	0.0	9.5	0.0	1.9	1.0	16.2	15.2
50 - 89	0.0	22.2	5.6	5.6	11.1	50.0	50.0
90 or more	0.0	50.0	5.6	22.2	16.7	88.9	66.7

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Regina CMA	--	--	2,600	2,741	2,850	2,939	3,364	3,524	2,774	2,884
Saskatoon CMA	**	**	2,171	2,254	1,782	1,637	2,222	2,180	1,988	1,899
Rest of Saskatchewan	1,675	1,542	1,799	1,863	2,224	2,360	3,122	3,272	1,958	2,021
Saskatchewan	**1,678**	**1,595**	**2,108**	**2,173**	**2,167**	**2,087**	**2,786**	**2,832**	**2,179**	**2,175**

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O1 Number of People On Wait List and Time on Waitlist
Saskatchewan

Centre	Average Number of People on Waitlist	Time on Waitlist in Months				
		0	1-2	3-5	6-11	12+
Regina CMA	15 d	6.4 d	++	9.6	9.6 c	** c
Saskatoon CMA	56 d	27.0 b	++	++	**	17.3 c
Rest of Saskatchewan	16 c	9.4 c	++	12.4 b	24.0 b	6.2 c
Saskatchewan	**31 b**	**42.7 b**	**7.5 d**	**23.0 b**	**40.1 b**	**27.7 b**

O2 Building Structure Makeup (%)
Saskatchewan

Centre	Concrete Frame	Wood Frame
Saskatchewan	**17.0%**	**83.0%**

O3 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Saskatchewan

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Regina CMA	Cable	12.1	84.8	3.0	--
	Telephone	3.0	97.0	--	--
Saskatoon CMA	Cable	20.4	72.2	7.4	**
	Telephone	--	100.0	--	--
Rest of Saskatchewan	Cable	16.7	66.7	16.7	**
	Telephone	1.9	96.3	1.9	--
Saskatchewan	**Cable**	**17.0**	**73.0**	**9.9**	**24.67**
	Telephone	**1.4**	**97.9**	**0.7**	**--**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

O4 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	**	3.0	1.9	2.3
Saskatoon CMA	1.4	2.4	7.8	4.6
Rest of Saskatchewan	8.0	4.2	4.2	4.7
Saskatchewan	**3.2**	**3.3**	**4.7**	**4.1**

O5 Average Rents ($) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre		Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	Semi Private	--	--	--	--
	Bachelor	**	2,424	2,926	2,741
	One Bedroom	--	**	3,016	2,939
	Two Bedroom +	--	**	3,387	3,524
	All	**	2,669	3,003	2,884
Saskatoon CMA	Semi Private	**	**	--	**
	Bachelor	1,887	**	2,344	2,254
	One Bedroom	879	**	**	1,637
	Two Bedroom +	**	**	**	2,180
	All	1,026	**	2,507	1,899
Rest of Saskatchewan	Semi Private	**	**	1,462	1,542
	Bachelor	1,879	1,715	1,923	1,863
	One Bedroom	1,213	**	2,542	2,360
	Two Bedroom +	--	--	3,272	3,272
	All	1,715	1,777	2,163	2,021
Saskatchewan	**Semi Private**	**	**	**1,462**	**1,595**
	Bachelor	**1,926**	**2,037**	**2,277**	**2,173**
	One Bedroom	**910**	**2,417**	**2,717**	**2,087**
	Two Bedroom +	**	**2,849**	**3,132**	**2,832**
	All	**1,240**	**2,206**	**2,484**	**2,175**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became National in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2011 Survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e. before January 2010
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C).
- ✓ Offer an onsite meal plan
- ✓ Does not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ And at least 50% of resident's are 65 years of age or older

The Seniors' Housing Survey is a census and not a sample survey therefore all senior's residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. 2010 data in this publication may differ from what was published last year, due to survey zone changes in 2011. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one-half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space occupied by a resident who does not receive a high level of care (i.e. the resident receives less than 1.5 hours of care per day.) Regional terms for this type of space vary across the country. In cases where there is no additional charge paid for a high level of care, the estimate of the number of standard spaces may include units where the resident receives a high level of care.

Heavy Care Space: A space where the residence provides 1.5 hours or more of healthcare per day to the resident. Examples include Alzheimer, Dementia and mobility support residents. Heavy care space estimates for occupied spaces may only include those where the resident is required to pay for a high level of care.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population and then expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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